

**WHAT IS CLAIMED IS:**

1           1.    A method of facilitating enterprise change

2    comprising:

3           treating two or more information systems as a single  
4    logical information system to execute pre-change due diligence  
5    and post-change integration of an enterprise change, wherein  
6    the enterprise change is at least one of a merger and  
7    acquisition; and

8           providing a user interface to allow a user to conduct a  
9    synergy realization

1           2.    The method of Claim 1 further comprising allowing

2    the user to conduct a merger-related activity with at least  
3    one of a software task, a software technique, and a software  
4    interface, wherein the software interface includes a graphical  
5    user interface.

1           3.    A method comprising:

2           generating a single logical physically distributed  
3    information system across one or more information systems of  
4    at least two enterprises, wherein the enterprises are being  
5    combined; and

6           providing a user interface to access the single logical  
7    physically distributed information system, the single logical  
8    physically distributed information system executing one or  
9    more pre-merger activities, merger activities, and post-merger  
10   activities, the merger activities including a synergy  
11   realization.

1           4.    The method of Claim 3 wherein the user interface is  
2    adapted to at least one of a role of the user and a phase of  
3    the merger, the user role including a role of a merger member.

1           5.    A system for implementing a merger of at least two  
2 organizations, the system comprising a software product and an  
3 interface for a user to edit synergy information for at least  
4 one of the organizations.

1           6.    The system of Claim 5 wherein the software product  
2 comprises reference modules adapted for merger teams, the  
3 reference modules including checklists, deliverables, project  
4 plans, tasks, resources, and assignments.

1           7.    The system of Claim 5, wherein the interface  
2 comprises information for a financial impact, an indicator of  
3 a priority level for an issue, a scale of measurement for  
4 synergy realization, and a selector for approval of one or  
5 more synergies and one or more risks.

1           8.    A system for planning a merger of at least two  
2 organizations, the system comprising a synergy realization  
3 user interface, the synergy realization user interface  
4 including a synergy targets section, a risks section, and a  
5 sub-deliverables section.

1           9.    The system of Claim 8, wherein the synergy  
2 realization interface further comprises a section for merger-  
3 related alerts, news, and messages, the synergy targets  
4 section including a synergy and an initiative, the risks  
5 section including a risk level impact, the sub-deliverables  
6 section including sub-deliverables and deadlines, the synergy  
7 realization interface further including one or more links.

1           10.   The system of Claim 8 further comprising a panel  
2 adapted to present merger-related views, the panel including a  
3 link to a file space view, a link to a methodology view, a

4 link to a view of research and reports, and a link to a view  
5 of a merger log.

1 11. The system of Claim 8 further comprising an  
2 interface for a synergy category, the interface for a synergy  
3 category including an identified value, a list of objects, and  
4 a checklist of integration issues, the identified value  
5 including a financial impact, the list of objects including  
6 research information, reports, and financial information.

1 12. A system comprising:  
2 an interface adapted to present a financial checklist  
3 relating to an organization in a merger of at least two  
4 organizations the financial checklist including a risk and a  
5 synergy, the interface including a button adapted to add an  
6 item to the checklist, and a button to delete an item from the  
7 checklist; and

8 one or more lists of legal data, accounting data, and  
9 data internal to at least one of the organizations.

1 13. The system of Claim 12 wherein the interface further  
2 comprises a synergy type, a synergy title, a synergy owner,  
3 and a synergy financial impact.

1 14. A system for planning a merger of at least two  
2 organizations, the system comprising one or more synergy-  
3 related interfaces presenting at least one of merger financial  
4 information, a merger risk, a description of a merger risk, a  
5 description of a synergy, a log of a plurality of merger  
6 actions, and an interface for one or more user actions related  
7 to the merger.

1 15. The system of Claim 14 wherein the merger financial  
2 information comprises a budget, a return on investment, a cost

3 savings, an estimated impact, an actual impact, and financial  
4 resources.

1 16. The system of Claim 14 wherein the one or more user  
2 actions comprise an approval action, a rejection action, a  
3 cancellation action, and a storing action.

1 17. A system for planning a merger of at least two  
2 organizations, the system comprising a user interface a layer  
3 of merger application logic services, and tools for sales-  
4 related synergies of at least one of the organizations.

1 18. The system of Claim 17 wherein the system further  
2 comprises one or more interfaces for sales integration,  
3 account transitions, file sharing, discussions, deliverables,  
4 and calendars.